

**UNITED STATES DISTRICT COURT
EASTERN DISTRICT OF PENNSYLVANIA**

STEVEN CURD and REBEL CURD,
Derivatively on Behalf of SEI
INTERNATIONAL EQUITY FUND, SEI
HIGH YIELD BOND FUND, SEI TAX-
MANAGED LARGE CAP FUND, SEI
TAX-MANAGED SMALL/MID CAP
FUND, and SEI INTERMEDIATE-TERM
MUNICIPAL FUND,

Plaintiffs,

V.

**SEI INVESTMENTS MANAGEMENT
CORPORATION, and SEI
INVESTMENTS GLOBAL FUNDS
SERVICES,**

Defendants.

Case No. 2:13-cv-07219-AB

JOINT SCHEDULING ORDER

Plaintiffs Steven Curd and Rebel Curd ("Plaintiffs"), by and through their undersigned counsel, and defendants SEI Investments Management Corporation and SEI Investments Global Funds Services (collectively, "Defendants"), by and through their undersigned counsel, hereby stipulate and agree to the following discovery plan as follows:

WHEREFORE, it is hereby agreed that:

1. In accordance with Rule 26(a)(1) of the Federal Rules of Civil Procedure, initial disclosures shall be made no later than December 17, 2015.
2. A United States Magistrate Judge shall be appointed to handle all discovery or case management disputes.
3. The parties shall be limited to thirteen (13) fact depositions per side. The parties shall be limited to twenty-five (25) interrogatories, (including all subparts), per party, except

upon leave of Court. The parties' right to request additional depositions and/or interrogatories is preserved. If after meeting and conferring in good faith, the parties are unable to agree on additional depositions and/or interrogatories, they shall raise the issue with the appointed Magistrate Judge informally or via motion.

4. Neither party shall use documents or testimony concerning: (a) the services performed or fees received by the Defendants for the period from July 1, 2016 forward or (b) the SEI Funds'¹ Board of Trustees' ("Board") section 15(c) of the Investment Company Act of 1940 process ("Section 15(c)"), Board meetings, or Board materials for the period from July 1, 2016 forward, for any purpose in this action, including, but not limited to, any expert report, dispositive motion, or at trial, and Defendants shall not be required to produce in this action any documents relating to the fees paid, services performed, Section 15(c) process, Board meetings, or Board materials for the period from July 1, 2016 forward.

5. In the event, Plaintiffs file an action seeking damages for any period after September 18, 2015, the parties shall meet and confer in good faith regarding discovery in such action, including the production of documents for the period from July 1, 2016 forward.

6. Defendants shall produce all non-privileged Board materials and meeting minutes for the SEI Funds for the period from January 1, 2012 through 2015, no later than February 17, 2016.

7. Fact discovery shall be completed no later than January 13, 2017.

8. Plaintiffs' expert reports are due no later than March 17, 2017.

9. Defendants' expert reports are due no later than May 19, 2017.

¹ "SEI Funds" refer to SEI High Yield Bond Fund, SEI International Equity Fund, SEI Intermediate-Term Municipal Fund, SEI Tax-Managed Large Cap Fund, and SEI Tax-Managed Small/Mid Cap Fund.

10. Plaintiffs' rebuttal expert reports are due no later than June 19, 2017.
11. Expert discovery shall be completed no later than August 18, 2017.
12. Dispositive motions are to be filed by September 29, 2017; oppositions to dispositive motions are due November 1, 2017; reply briefs in support of dispositive motions are due November 27, 2017.
13. Dates for a Pretrial Conference and deadlines for pre-trial motions and submissions shall be later set by the Court.

Dated: November 9, 2015

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s/ Edward B. Gerard
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Dated: November 9, 2015

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*Counsel for Defendants SEI Investment
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APPROVED AND SO ORDERED.



HON. ANITA B. BRODY
UNITED STATES DISTRICT JUDGE

November 10, 2015

Copies via ECF on 11/10/15

CERTIFICATE OF SERVICE

I hereby certify that this document filed through the CM/ECF system will be sent electronically to the registered participants as identified on the Notice of Electronic Filing (NEF).

Dated: November 9, 2015

s/ Edward B. Gerard
EDWARD B. GERARD